HVAC VISIT AND DEFERRED-TASK REVIEW / 01

MATCH PLANNED TASKS TO ONE VISIT

Use existing records. Ask the provider to define tasks and intervals; do not inspect equipment yourself.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Equipment E1 / plan version / provider-defined task reference T1

Visit V1 / date / service-report reference linked to E1 and T1

T1 / reported performed, not performed or unclear / provider explanation reference

Equipment E2 / plan version / provider-defined task reference T2

Visit V1 / report reference linked to E2 and T2

T2 / reported performed, not performed or unclear / provider explanation reference

Preparation only. Not a technical maintenance plan, task interval, compliance finding, safety clearance or work authorization. Do not inspect or operate equipment. Keep private details out.

HVAC VISIT AND DEFERRED-TASK REVIEW / 02

FOLLOW AN UNPERFORMED ITEM TO ITS RETURN

A later visit is not proof that this item was completed. Keep each status tied to a report.

Open item D1 / original equipment, task and visit labels / provider's reason reference

D1 / next-step contact / access or operating-coordination question - no access details

D1 / separate proposal reference / actual authorization reference or not yet authorized

D1 / proposed or arranged return / later visit label / report still awaited?

Return report / original D1 link / provider-reported work and explanation reference

Remaining gap / provider clarification / changed plan version or next follow-up

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HVAC VISIT AND DEFERRED-TASK REVIEW / 03

CHECK THE REPORTING CONVERSATION

Tick what is organized. These checks do not confirm equipment condition or permission to operate.

- [ ] Equipment labels come from existing records
- [ ] Provider-defined task and plan version are referenced
- [ ] Each status is linked to a specific visit report
- [ ] Blank or ambiguous report entries stay unclear
- [ ] Unperformed items retain a reason and contact role
- [ ] Proposed work is separate from actual authorization
- [ ] Return reports link to the original deferred item
- [ ] No task interval, safety judgment or operating instruction is invented

Report item still unclear / equipment and task labels / person to explain

Open-item list version / return reports received / unresolved items retained

Site contact and provider coordination roles / separate-work questions

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HVAC VISIT AND DEFERRED-TASK REVIEW / 04

QUESTIONS FOR THE HVAC SERVICE PROVIDER

Ask about reporting and unresolved work. Qualified parties define the technical maintenance program.

Traceability: how do reports connect equipment, task and plan versions?

Status: how do you distinguish performed, not performed and unaddressed items?

Exceptions: who explains deferred work and coordinates site constraints?

Separate work: how are proposals, authorization and follow-up scheduling recorded?

Returns: how does the later report connect to the original item and remaining gap?

Terms: what reporting, follow-up, response, exclusions and separate fees are included?

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HVAC VISIT AND DEFERRED-TASK REVIEW / 05

COMPARE VISIT REPORTING AND FOLLOW-UP

Use Provider A and B with the same task-reference examples. Do not compare vague tune-up labels.

Provider A / B / proposal dates / common equipment and task-reference list

Plan-version links, visit reports and task-status distinctions - A / B

Deferred items, coordination roles, separate work and return-report links - A / B

Open-item review, response terms, exclusions, fees and unresolved questions - A / B

READY TO HEAR FROM PROS?

If you choose, create an account on PickYourPro.ai and start a Commercial HVAC request. Describe the maintenance-reporting and follow-up help you need so participating pros can compete with proposals. Compare provider-defined scope, visit records, deferred-task follow-up, exclusions and written terms. Share sensitive facility records only through approved private channels.

One request. Every pro's best offer.

Start a request

Participation varies. A provider-led site and maintenance-record review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/commercial-hvac/preventive-maintenance

ASHRAE: Standards 180 and 211 overview (official reference)

ASHRAE: Standard 180-2018 public preview (official reference)

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